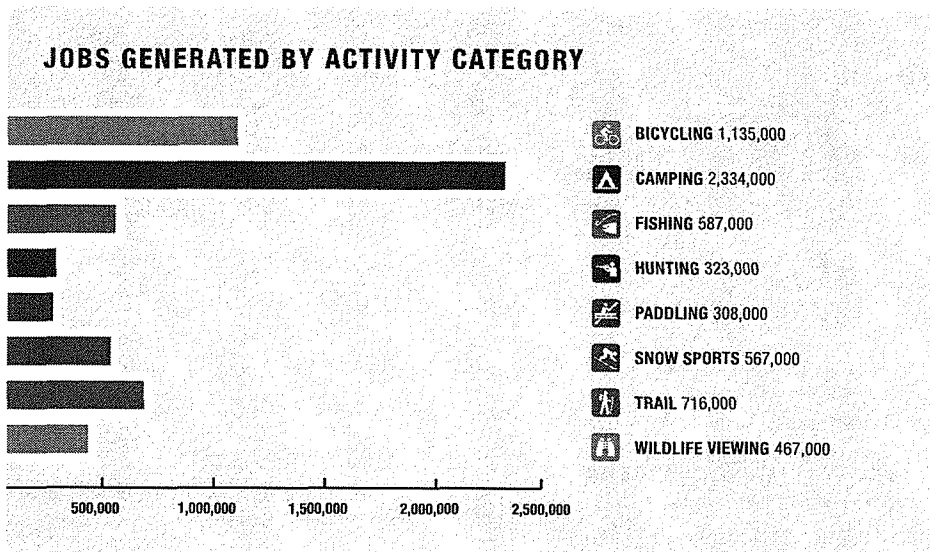


The Active Outdoor Recreation Economy Employs America

Nearly 6.5 million Americans are working thanks to the Active Outdoor Recreation Economy. That's one out of 20 workers in the U.S. These are not just stereotypical seasonal jobs such as cleaning campgrounds or operating ski lifts. Instead, the economy supports a wide range of careers with diverse skills. These sustainable jobs are not confined to any single economic sector and they, in turn, support larger industries—manufacturing, leisure and hospitality, transportation, and wholesale and retail trade. In short, the Active Outdoor Recreation Economy is one of America's most important employers.



FAST FACTS

- ★ More Americans owe their jobs to bicycle-based recreation than there are people employed as lawyers.⁵
- ★ More Americans owe their jobs to snow-based recreation than there are physicians and surgeons.⁶
- ★ The Active Outdoor Recreation Economy employs five times more Americans than Wal-Mart, the world's largest private employer.⁷
- ★ Camp-based recreation in the U.S. could employ the entire population of Utah.

Note: The jobs figures in the Report are termed "average annual employment" by the economic model. The jobs figures represent an average job for the industry impacted and do not represent full-time equivalent jobs.

⁵ U.S. Department of Labor, Bureau of Labor Statistics, http://www.bls.gov/oes/2004/may/oes_00Al.htm

⁶ *ibid*

⁷ Wal-Mart Annual Report

The Active Outdoor Recreation Economy Generates \$88 Billion in Tax Revenues

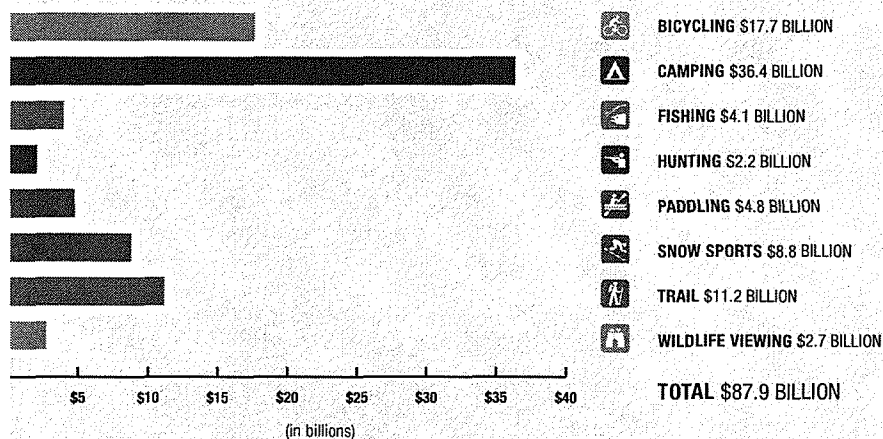


The federal tax revenue generated by the Active Outdoor Recreation Economy (\$48.5 billion) would cover the budget of the Department of Interior (\$16.4 billion in 2005) for nearly 3 years.⁸

\$88 Billion Coming Back to America: Tax Receipts

The cash spent by Americans in pursuit of active outdoor recreation benefits all Americans, generating \$88 billion in state and federal taxes (sales tax and income tax). This tax influx, in turn, supports government programs that empower and develop communities.

FEDERAL AND STATE TAXES GENERATED BY ACTIVITY CATEGORY



Jump-starting Rural Economic Development

The jobs, tax revenues, and business created by the Active Outdoor Recreation Economy are the lifeblood of rural communities that rely on recreation tourism to enjoy a high quality of life.

According to the US Department of Agriculture, rural tourism and recreational development:

- Spikes employment growth rates
- Buys earnings and income levels
- Lowers local poverty rates
- Shepherds improvements in local educational attainment and health⁹

Mining, logging, oil and gas, and agriculture are the traditional backbone of many rural economies. Today, the sustainable Active Outdoor Recreation Economy has joined that list as communities seek to create a balanced and stable base for long-term economic and community development.

CASE STUDY ★

FRUITA, CO

Eleven years ago, businessman Troy Rarick took a big chance and opened a bike shop in the struggling town of Fruita, Colorado. Over the Edge Sports was one of the few businesses in the mostly vacant downtown. But the shop encouraged the community to build mountain bike trails and organize an annual Fruita Fat Tire Festival. In the 10 years since, Fruita has earned a reputation as a world-class mountain biking destination that pumps \$1.5 million a year into the local economy, according to the Bureau of Land Management. And Fruita's sales tax revenues have increased by 51 percent in the last 5 years, including an 80 percent increase in sales tax revenues from restaurants.¹⁰

MOAB, UT

In 1990, Western Spirit Cycling, based in Moab, Utah, consisted of two employees who ran three trips a year. In 2006, the company employed 35 people and ran hundreds of trips in states throughout the country, spending cash in hotels, grocery stores, restaurants, and bike shops in small towns across the U.S.

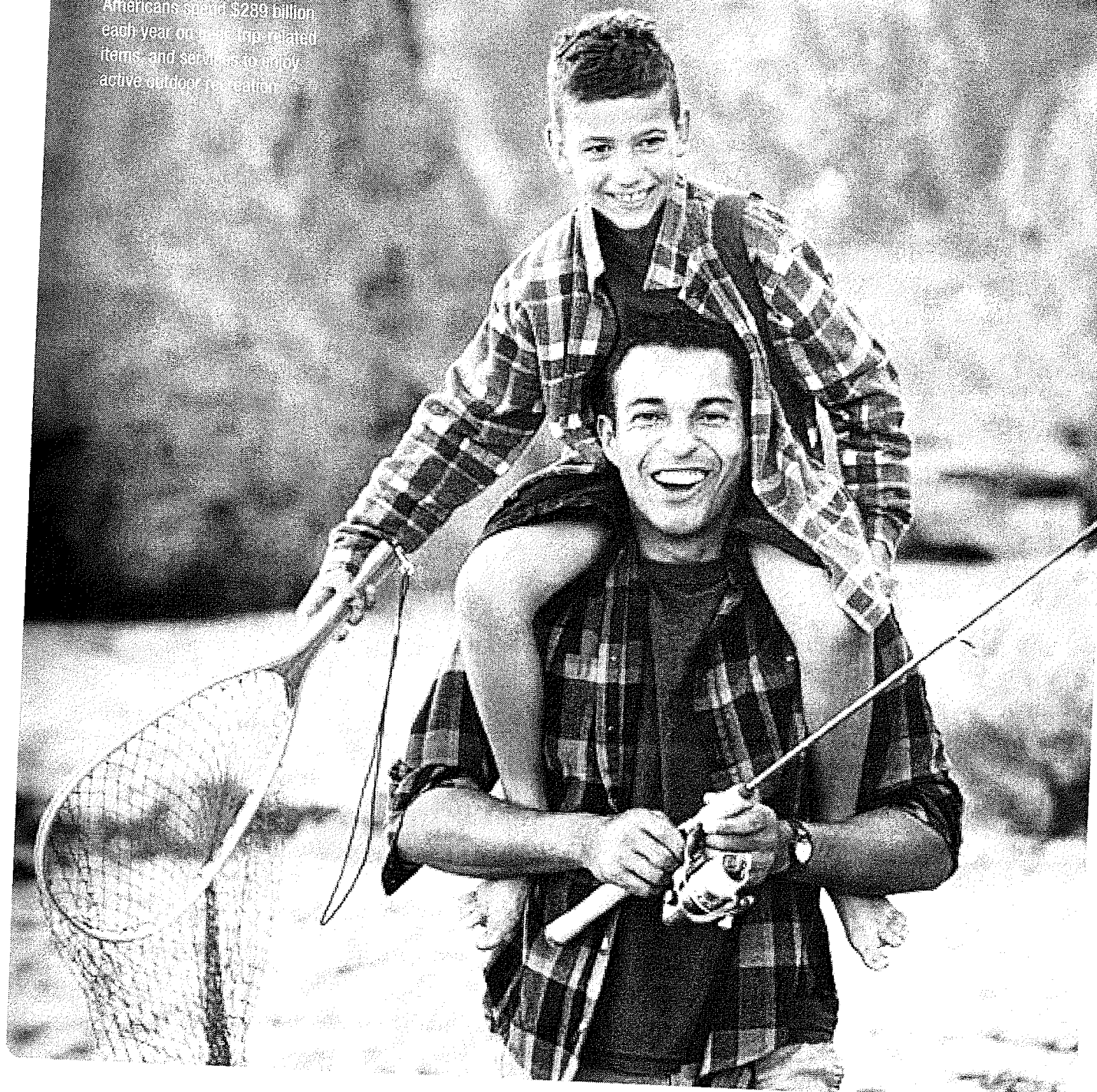
⁸ Department of the Interior, <http://www.doi.gov/facts.html>

⁹ U.S. Department of Agriculture, Economic Research Service, August 2005, "Recreation, Tourism, and Rural Well-Being," Richard J. Reeder, and Dennis M. Brown

¹⁰ Bureau of Land Management North Fruita Desert Management Plan-November 2004.

The Active Outdoor Recreation Economy Means Business

Americans spend \$289 billion each year on travel-related items and services to enjoy active outdoor recreation.



Ringin Up \$289 Billion in Retail Sales

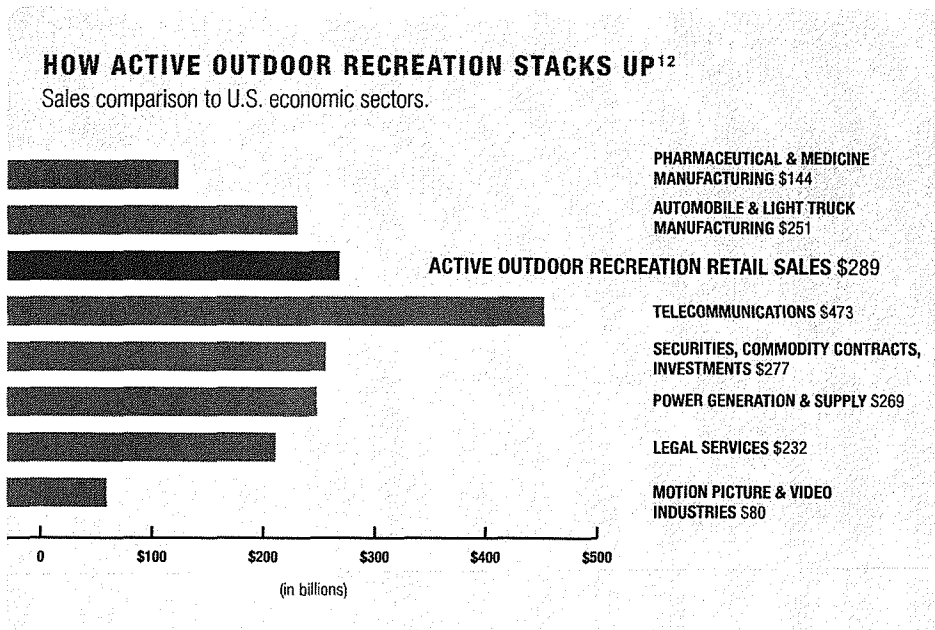
The most obvious boost the Active Outdoor Recreation Economy gives to the nation comes at the cash register. Participants spend their money on both gear and trips.

- Quality gear is key to a fulfilling outdoor experience, and Americans spend \$46 billion each year on their equipment, apparel, footwear, accessories, and services.
- Americans want to spend money on active outdoor excursions, and they spend \$243 billion on trips ranging from a summer camping vacation to an afternoon family bike ride.

That adds up to a whopping \$289 billion spent annually on active outdoor recreation gear and trips, a bigger direct expenditures contribution to the U.S. economy than that of the securities, commodity contracts, and investments industry (\$277 billion).¹¹

An Overlooked Economic Giant

The Active Outdoor Recreation Economy is big business. It ranks alongside and even dwarfs other major economic sectors in the U.S., such as telecommunications, hospitals and motion pictures and videos.



CASE STUDY ★

Cuyahoga Valley National Park, OH

Do you think most visitors come to National Parks and National Forests for extended destination vacations? Think again. There were 273 million visits to National Parks in 2005, but only 13.8 million overnight stays.¹³ Over half of recreation visits to National Forests are day trips.¹⁴

- Ohio's Cuyahoga Valley National Park welcomed almost 2.9 million recreation visits in 2003, yet less than five percent were overnight trips.¹⁵
- The 2.7 million day trippers spent over \$44 million during their visits.
- Day trips stimulated 80 percent of the total visitor spending to Cuyahoga, supporting 1,296 local jobs.

Note: The following expenditures were not included: outdoor-lifestyle-inspired purchases made by non-participants, the portion of a purchase that would have been made even if the respondent did not participate, purchases by minors, purchases by foreigners for U.S. products (goods and services) and purchases by foreigners during outdoor trips in the U.S., U.S. resident travel abroad, and large durable purchases such as boats and RVs. (See technical report for more details.)

¹¹ Bureau of Economic Analysis, Industry Economic Accounts, <http://www.bea.gov/bea/dn2.htm>

¹² *ibid*

¹³ National Park Service <http://www2.nature.nps.gov/stats/>

¹⁴ Stynes, Daniel and White, Eric. Spending Profiles of National Forest Visitors, NVUM Four Year Report, May 2005

¹⁵ National Park Service <http://www2.nature.nps.gov/stats/>

BUSINESS 16**CASE STUDY ★****METHOW VALLEY, WA**

The Methow Valley trail system in north-central Washington includes nearly 125 miles of groomed paths for cross-country skiing, off-road bicycling, and horseback riding, attracting visitors from across Washington state and beyond.¹⁶

- Trail user (local, resident, non-local) expenditures average \$1,469 per party, per trip.
- Nearly \$4.5 million in direct expenditures are made annually to the Methow Valley economy by trail users.
- The ripple effect creates an additional \$4.1 million economic contribution to the local economy.

Note: A conservative 10% of "secondary" trip expenditures were included for non wildlife-based active outdoor recreation trips. Active outdoor recreation expenditures were made on the trip but the purpose of the trip was not primarily for recreation. However, expenditures would not have occurred unless recreation opportunities existed.

¹⁶ Methow Valley Sport Trails Association, prepared by Resource Dimensions; "Economic Impacts of MVTSA Trails and Land Resources in the Methow Valley," July 2005)

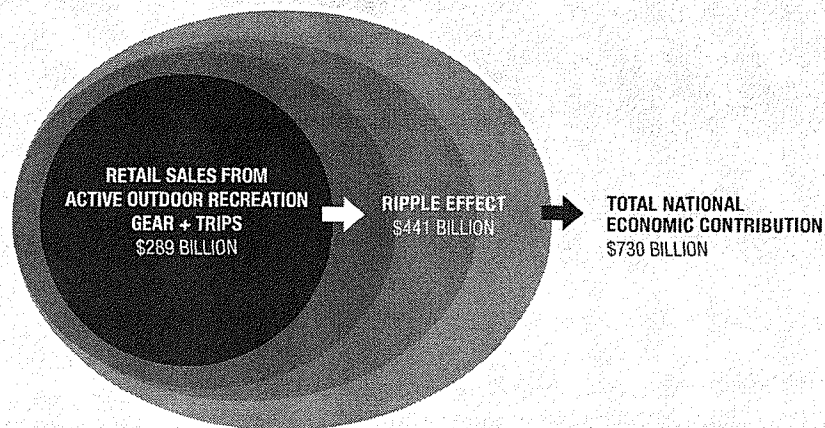
The Ripple Effect Multiplies the Contribution of Sales

No economy exists in a vacuum. The \$289 billion Americans spend on active outdoor recreation gear and trips circulates further through the economy, creating a virtuous cycle, known as the "multiplier" or "ripple" effect, which adds up to another \$441 billion to create the \$730 billion Active Outdoor Recreation Economy. This dynamic economy is a sum total of economic interactions that benefit all of America's major economic sectors.

Think of a kayak slicing through the water. The kayak creates ripples in the water that move further away as they dissipate. Likewise, when a patron goes to an outdoor store and buys a kayak, the economic contribution is not limited to the money the consumer gives to the retail store. The purchase creates ripples that affect the suppliers of materials for the boat, the boat manufacturer, and the shipping company that transported the kayak.

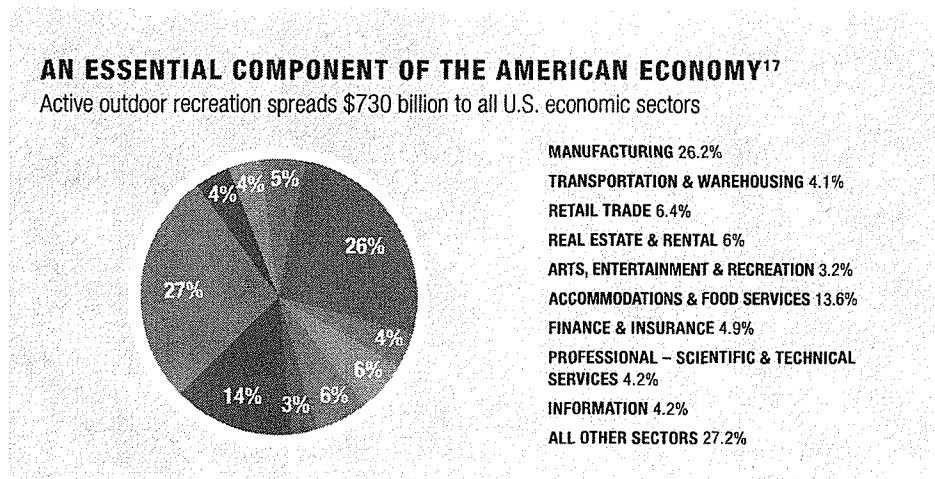
Additionally, the outdoor store employee and the employees of the suppliers and manufacturers spend their paychecks on goods and services. This further economic contribution accumulates each time it passes through a different set of hands, yet is smaller at each touch point as the ripples grow smaller but continue to be felt.

FAR REACHING RIPPLES



Beyond the Outdoor Industry

The Active Outdoor Recreation Economy reaches far beyond the outdoor industry, making major direct contributions to all the building-block sectors of the American economy, including manufacturing, transportation, and real estate.



FAST FACTS

★ Americans spent 88 times more on bicycle-based recreation in one year than the total box office draw for *Titanic*, the top grossing movie of all time.¹⁹

★ The Great Allegheny Passage, connecting Pittsburgh to the C&O Canal towpath leading to Washington, D.C., generated \$7 million in direct spending in 2002. Bolstered by the growth of trail-related businesses, the Passage will stimulate an estimated \$12 to \$15 million in direct spending in 2007.²⁰

★ Studies estimate that physically inactive individuals have 24 percent higher health-care costs than active individuals.²¹

And \$730 Billion Is Just the Beginning

This report took a conservative approach in defining expenditures related to active outdoor recreation. Many participants make additional big-ticket purchases that add to the national economy which were not included in this report.

- Over \$30 billion of boat and other big-ticket sales from wildlife-based recreation were not added into this calculation of the Active Outdoor Recreation Economy.
- Only a small portion of the over \$14 billion in recreation vehicle sales were included in this report.¹⁸
- Participants buy and lease land (\$12 billion from wildlife based recreation alone), cabins, and second homes. This study does not take those property sales into account.

When you add in these big-ticket items and purchases for fishing, hunting and wildlife viewing, the Active Outdoor Recreation Economy pumps \$900 billion into the U.S. economy each year.

¹⁷ Bureau of Economic Analysis, Industry Economic Accounts, <http://www.bea.gov/bea/dn2.htm>

¹⁸ Recreational Vehicle Industry Association-
<http://rvia.org/Media/ShipmentsData.htm>

¹⁹ <http://movies.go.com/boxoffice?cat=2005>

²⁰ Farber Ph.d, Stephen, "2002 User Survey for The Pennsylvania Allegheny Trail Alliance," University Center for Social and Urban Research, University of Pittsburgh; Allegheny Trail Alliance

²¹ www.cdc.gov

Conclusion

Learn more on the web at:
outdoorindustryfoundation.org

The \$730 Billion Active Outdoor Recreation Economy Offers a Healthy, Sustainable Future for All Americans

The Active Outdoor Recreation Economy is a vital force in the national economy, yet is often overlooked. It supports nearly 6.5 million jobs and impacts all geographical regions of the country. It is inclusive of all gender, racial, ethnic, and religious groups. It pumps capital into major sectors of U.S. industry. The Active Outdoor Recreation Economy is sustainable year after year.

Furthermore, the \$730 billion figure established by this report is just a small fraction of the deeper value that Americans place on the opportunity to recreate in nature. Major corporations make decisions on where to build and invest based upon the quality of life they can offer employees. Real estate and land near outdoor recreation opportunities has been shown to increase in value. There are compelling non-market benefits to a healthy Active Outdoor Recreation Economy (education, science, research, biodiversity), which can also multiply the economic contribution.

Beyond business, active outdoor recreation improves the physical health of the nation. Over 30 percent of adult Americans and 16 percent of children and teens are obese. Increased participation in outdoor recreation is a natural solution to this obesity crisis. Getting more Americans to participate in a stronger Active Outdoor Recreation Economy also reduces health-care costs and creates a greater sense of well-being and happiness for everyone.

Active outdoor recreation's \$730 billion contribution is essential to our economic foundation. The recognition and stimulation of this market force should be a prime concern to all Americans who value a flourishing, sustainable economy. But the true value of outdoor recreation cannot be quantified; it is a priceless American treasure.



APPENDIX 19

ACTIVE OUTDOOR RECREATION TOTALS BY CENSUS DIVISION AND ACTIVITY CATEGORY

To review a listing of census divisions, please see pages 6 and 7 of this report, or visit www.outdoorindustryfoundation.org.

	CENSUS D1	D2	D3	D4	D5	D6	D7	D8	D9	NATIONAL	
Bicycle-Based Recreation	# Participants (thousands)	2,496	8,161	11,329	42,351	10,715	1,592	6,491	4,078	10,313	59,837
	% Population Participating	23%	26%	33%	28%	25%	20%	26%	27%	29%	27%
	Gear Retail Sales* (millions)	\$331	\$677	\$873	\$310	\$1,370	\$219	\$621	\$429	\$1,399	\$6,230
	Trip Related Sales* (millions)	\$2,814	\$3,097	\$11,209	\$1,781	\$8,272	\$3,084	\$3,941	\$3,715	\$9,024	\$46,938
	Jobs Supported	40,121	44,298	190,972	31,615	134,881	43,828	66,290	59,939	135,422	1,135,268
	Taxes - Federal and State (millions)	\$555	\$623	\$2,162	\$359	\$1,623	\$310	\$766	\$1,007	\$1,862	\$17,701
	Total Economic Contribution (millions)	\$3,372	\$4,757	\$17,024	\$2,704	\$11,337	\$3,895	\$6,884	\$6,233	\$15,001	\$132,827
Camp-Based Recreation	# Participants (thousands)	1,874	4,910	8,687	3,441	7,258	1,374	4,203	4,934	8,479	45,161
	% Population Participating	17%	16%	25%	23%	17%	18%	17%	33%	24%	21%
	Gear Retail Sales* (millions)	\$362	\$901	\$1,660	\$606	\$1,345	\$290	\$966	\$864	\$1,652	\$6,676
	Trip Related Sales* (millions)	\$6,646	\$9,281	\$14,687	\$6,171	\$19,867	\$4,122	\$9,454	\$13,992	\$16,393	\$100,614
	Jobs Supported	89,384	119,512	258,363	102,475	296,727	58,549	151,838	214,870	234,468	2,333,638
	Taxes - Federal and State (millions)	\$1,236	\$1,681	\$2,926	\$1,164	\$3,573	\$1,207	\$1,755	\$3,611	\$3,224	\$36,387
	Total Economic Contribution (millions)	\$7,513	\$12,834	\$23,031	\$8,765	\$24,940	\$5,204	\$15,767	\$22,345	\$25,972	\$273,037
Fishing**	# Participants (thousands)	1,890	3,500	6,040	4,320	8,180	3,020	4,730	3,280	4,480	32,900
	% Population Participating	17%	11%	18%	28%	20%	22%	19%	23%	12%	18%
	Gear Retail Sales* (millions)	\$271	\$509	\$845	\$646	\$1,478	\$439	\$749	\$587	\$893	\$6,416
	Trip Related Sales* (millions)	\$757	\$1,119	\$1,660	\$1,426	\$3,222	\$1,013	\$1,659	\$1,862	\$2,574	\$16,205
	Jobs Supported	17,195	26,912	50,294	39,887	92,667	30,638	47,627	46,319	62,080	586,512
	Taxes - Federal and State (millions)	\$140	\$238	\$388	\$305	\$659	\$201	\$333	\$306	\$529	\$4,050
	Total Economic Contribution (millions)	\$1,768	\$3,073	\$5,066	\$4,003	\$8,841	\$2,862	\$4,801	\$4,454	\$6,576	\$61,429
Hunting***	# Participants (thousands)	450	1,820	2,460	2,100	1,970	1,440	2,190	1,340	850	12,800
	% Population Participating	4%	6%	7%	14%	5%	11%	9%	10%	2%	6%
	Gear Retail Sales* (millions)	\$159	\$773	\$1,072	\$761	\$886	\$791	\$1,101	\$752	\$592	\$6,886
	Trip Related Sales* (millions)	\$271	\$401	\$595	\$511	\$1,155	\$363	\$595	\$667	\$922	\$5,528
	Jobs Supported	7,234	17,702	32,151	25,227	38,067	22,627	31,249	28,830	25,830	322,570
	Taxes - Federal and State (millions)	\$46	\$148	\$231	\$169	\$266	\$146	\$211	\$174	\$200	\$2,186
	Total Economic Contribution (millions)	\$731	\$2,174	\$3,293	\$2,431	\$3,821	\$2,315	\$3,282	\$2,605	\$2,781	\$34,090
Paddle-Based Recreation	# Participants (thousands)	1,586	3,356	4,607	1,462	4,410	702	1,637	1,586	4,246	23,596
	% Population Participating	14%	11%	13%	10%	10%	9%	7%	11%	12%	11%
	Gear Retail Sales* (millions)	\$101	\$356	\$433	\$181	\$563	\$105	\$168	\$175	\$585	\$2,668
	Trip Related Sales* (millions)	\$631	\$1,591	\$1,781	\$505	\$1,757	\$616	\$712	\$860	\$3,324	\$11,778
	Jobs Supported	9,331	22,844	34,999	10,393	32,457	9,571	12,781	14,976	50,805	308,469
	Taxes - Federal and State (millions)	\$129	\$321	\$396	\$118	\$391	\$197	\$148	\$252	\$699	\$4,810
	Total Economic Contribution (millions)	\$784	\$2,453	\$3,120	\$889	\$2,728	\$851	\$1,327	\$1,557	\$5,628	\$36,091
Snow-Based Recreation	# Participants (thousands)	1,473	2,160	2,274	1,176	2,141	224	776	1,858	3,505	15,587
	% Population Participating	13%	7%	7%	8%	5%	3%	3%	13%	10%	8%
	Gear Retail Sales* (millions)	\$206	\$461	\$295	\$213	\$518	\$46	\$132	\$490	\$765	\$3,125
	Trip Related Sales* (millions)	\$4,091	\$3,047	\$1,672	\$714	\$1,590	\$110	\$0	\$6,501	\$5,685	\$23,412
	Jobs Supported	54,801	41,172	31,085	14,021	29,485	2,080	1,914	101,115	83,815	566,629
	Taxes - Federal and State (millions)	\$758	\$579	\$352	\$159	\$355	\$43	\$22	\$1,699	\$1,153	\$8,835
	Total Economic Contribution (millions)	\$4,606	\$4,421	\$2,771	\$1,199	\$2,478	\$185	\$199	\$10,515	\$9,284	\$66,296
Trail-Based Recreation	# Participants (thousands)	3,048	6,648	8,122	3,407	9,642	1,746	5,250	5,433	12,538	55,834
	% Population Participating	28%	22%	23%	23%	23%	23%	21%	36%	35%	26%
	Gear Retail Sales* (millions)	\$184	\$401	\$281	\$209	\$517	\$133	\$474	\$361	\$780	\$3,340
	Trip Related Sales* (millions)	\$2,065	\$3,792	\$2,136	\$869	\$5,486	\$1,003	\$1,792	\$6,307	\$6,726	\$30,177
	Jobs Supported	28,686	49,218	38,208	16,292	83,978	15,073	32,916	96,450	97,523	715,661
	Taxes - Federal and State (millions)	\$397	\$692	\$433	\$185	\$1,011	\$311	\$380	\$1,621	\$1,341	\$11,159
	Total Economic Contribution (millions)	\$2,411	\$5,285	\$3,406	\$1,394	\$7,058	\$1,340	\$3,418	\$10,030	\$10,802	\$83,733
Wildlife Viewing****	# Participants (thousands)	4,990	9,580	12,500	6,930	12,900	5,090	6,150	6,870	10,500	66,100
	% Population Participating	45%	31%	37%	46%	32%	37%	25%	49%	29%	30%
	Gear Retail Sales* (millions)	\$597	\$1,120	\$1,223	\$479	\$1,566	\$613	\$576	\$1,132	\$1,538	\$8,845
	Trip Related Sales* (millions)	\$421	\$623	\$925	\$794	\$1,794	\$564	\$924	\$1,036	\$1,433	\$8,591
	Jobs Supported	24,445	35,600	55,436	32,744	86,578	32,760	35,318	54,687	72,304	466,525
	Taxes - Federal and State (millions)	\$108	\$217	\$263	\$150	\$416	\$130	\$167	\$236	\$361	\$2,740
	Total Economic Contribution (millions)	\$1,756	\$3,303	\$4,242	\$2,451	\$6,392	\$2,138	\$2,787	\$3,757	\$5,652	\$43,476

* Sample sizes are detailed in the technical report.

** Source: American Sportfishing Association - "Sportfishing in America: Values of Our Traditional Pastime," 2002

*** Source: International Association of Fish and Wildlife Agencies - "The Economic Importance of Hunting in America," 2002

**** U.S. Fish and Wildlife Service - "2001 National and State Economic Impacts of Wildlife Viewing," Published 2003

^ Wildlife-based recreation activities (fishing, hunting, wildlife viewing) were derived from above sources which contain a greater level of details (including state information). Assumptions were made to align the methodologies of the wildlife-based studies with the Active Outdoor Recreation survey (other 5 activity categories). See technical report for details. Wildlife-based participation based on 16+ participation. Other 5 activity categories based on 18+. Wildlife-based participant populations used to derive incidence is the 2001 16+ population adjusted for each census division by the growth in national population from 2000 to 2005. Crossover participation data does not exist for wildlife viewing as defined by the USFW and the 5 Active Outdoor Recreation categories. Census division figures will not add to national figures due to larger national multipliers (greater leakages in smaller geographic region). D.C. wildlife figures are not included in the census trip expenditures but are included in the national figure.



SOUTHWICK ASSOCIATES, INC. OF FERNANDINA BEACH, FLORIDA, specializes in quantifying the economics of fish, wildlife, and outdoor-related activities. Founded in 1990, SA helps government agencies and industry understand the issues impacting people's use of outdoor resources and the related retail and economic trends. www.southwickassociates.com

OUTDOOR INDUSTRY FOUNDATION (OIF) is a non-profit foundation established by Outdoor Industry Association. OIF's charter is to increase participation in outdoor recreation and to encourage and support healthier active lifestyles. Through education, partnerships, programs, and advocacy, OIF is working to make active outdoor recreation the number one leisure activity in America. We invite you to join us on this important mission by making a long-term commitment to the health of our industry, our public lands, and our nation.

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